Create a Termination Workflow Transaction – Step-by-Step Procedure

Important Information

- If the Rehire status is Restricted or No Rehire, a letter must be scanned into ImageNow prior to the termination workflow transaction being started – See Use ImageNow for Termination Workflow – Step-by-Step Procedure for more information.

- After the termination workflow transaction is saved, it is only viewable by using Find Termination Workflow, see Review and Approve/Deny a Termination Transaction - Step-by-Step Procedure or Modify a Termination Workflow Transaction – Step-by-Step Procedure for more information.

- The Create Termination Workflow page can be used to initiate a corrected last day employed date. This is routed to the Central Office for further processing.

- A termination workflow transaction cannot be used to cancel a termination. A Job Data Submittal Form must be used.

- Transactions that require different approval paths must be processed as separate transactions.

- Refer to the Termination SPG for specific procedures.

- If using Google mail and you are the Creator and Approver of a termination workflow transaction, generated e-mails appear in ‘Sent’ mail.

- For exception processing, contact your HR Administrator.

- M-Pathways purges Termination Workflow Transactions with a Transaction Status of Draft after 48 business hours.

- Employees with current Additional Pay are processed with the following perimeters:
  - Processed timely (today’s date < payroll confirm date in which the termination date falls in):
    - If the End Date is open ended or has an End Date greater than today’s date, and the Additional Pay Effective Date is before today’s date, then the Earnings End Date is updated to the last day of the pay period prior to the termination date.
    - If the Effective Date of the Additional Pay is after the month the employee is terminated, the Additional Pay row is deleted.
    - If the Effective Date of the Additional Pay is after today’s date, then the Earnings End Date is updated to the end of the pay period for which the termination date falls.
  - NOT processed timely (today’s date >= payroll confirm date in which the termination date falls in)
    - If the End Date is open ended or has an End Date greater than today’s date, no additional pays are updated.

- If the Rehire status is Restricted Rehire or No Rehire, comments are required. “See termination letter” or “See personnel file” are not acceptable. Use these guidelines for comments:
  - For Restricted Rehire: Comments must explain what issues the employee had in the position and what type of position the employee may be able to perform successfully.
  - For No Rehire: Comments must explain the specific reason(s) the employee was not successful in the position and is being terminated or discharged.
cont.
- Graduate Students and Summary Salary Appointments are not eligible to use termination workflow. Graduate Students can be terminated in the mass purge process that runs three times a year, or by Submittal Form, see Create a Submittal Form for Graduate Student Terminations – Step-by-Step Procedure for more information.
- A workflow transaction must be initiated and approved by all unit approvers by the HRRIS cutoff in order to assure processing by the related payroll cutoff.

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Create Termination Workflow Transaction Page

1. Type the EmplID in the EmplID field. **Note:** If the EmplID is unknown, enter the Campus ID (uniqname). Using EmplID or Campus ID reduces search time and retrieves data efficiently. If EmplID and Campus ID are unknown, enter a first name and last name. To further narrow the search results, select a value from the Reg/Temp field.

2. Click **Search**.

Create Termination Workflow Transaction Page (cont.)

3. To review additional information, click the Job Summary (cont) tab or (Show all columns). **Note:** Results available are as of today’s date.

4. Turn on the appropriate Select? Checkbox.

5. Click **Begin Transaction**.
Create Termination Transaction Page

6. Click **Termination Checklist Review Required** to ensure that you have completed all the termination steps for the employee.

7. Click the arrow to view the **Person Modifier Summary** group box.

8. Type the appropriate date or select a date from the **Calendar** in the **Last Day Employed** field.

**Note:**
- **Last Day Employed** is the last day of employment and/or Leave of Absence. The effective date automatically populates as one day after the **Last Day Employed**.
- Once the **Last Day Employed** field is populated, the employment record(s) selected above in Job Summary populates current data as of the **Last Day Employed** date.

9. Select the appropriate value from the drop-down list in the **Action** field.

**Note:** The **Action** for a regular retirement is Retirement with Pay and the **Reason** is Retired. Retired with Pay does not mean the retiree is going to receive compensation after the retirement date, it means they receive benefits.

10. Select the appropriate value from the drop-down list in the **Reason** field.

**Note:** Termination Reason definitions can be found in the **Managers’ Toolkit**.

11. Review the **Future Addl Pay rows?** checkbox. If turned on, indicates future dated Additional Pay Earnings Codes may be ended by this process.

**Note:** If proration of the Additional Pay is needed, this can be done before the termination transaction is started or after the termination transaction is complete (recommended).
12. Turn on the appropriate radio button in the **Recommended for Rehire** group box.

13. Type any applicable comments in the **Comments** field.

**Note:** Comments need to contain the current date, the name of the person who made the rehire decision, and your name. For further information, see Important Information on Page 1 of this document.

14. If applicable, complete the **Employer**, **Address**, **City**, **State**, **Zip Code**, **Country**, **Telephone**, and **Title** fields.
Approvers

- Approvers review/approve the termination workflow transaction in the exact sequence order that you provide.
- Every Approver must approve the termination workflow transaction before it can be posted to the employee’s record.
- You must have the proper M-Pathways role in order to be listed as an Approver (eligible employees are listed using the Lookup).
- There is a limit of 10 Approvers per termination workflow transaction.
- If an employee has another appointment outside of your department, the appropriate Approver from that department must be added to the Termination Transaction Approvers group box.
- If the transaction requires approval from Dearborn Campus, Flint Campus, Graduate Medical Education, Health System HR Consultant, Staff HR, or Temporary Staffing Services, Creators can find the appropriate Approver by selecting the proper area from the Approver(s) drop-down list and EmplID.
15. Type the appropriate value in the **Seq#** field.

16. Accept the default or select a value from the drop-down list in the **Approvers(s)** field.

**Note:** If the transaction requires Staff HR, Health System HR Consultant, Dearborn, Flint, Graduate Medical Education or TSS approval, select the appropriate value from the drop-down list.

17. Type the Approver’s eight-digit **EmplID** number or select a value from the **Lookup** in the **EmplID** field.

18. Click **Insert** to add additional Termination Transaction Approvers.

**Note:**
- If the transaction requires Staff HR or Health System HR Consultant approval, Creators can find the appropriate approver by clicking the respective links.
- If Staff HR, Health System HR Consultant, or Temporary Staffing Services Approvers are required, list the appropriate Approver last with the highest sequence number.
- Some scenarios require HRRIS approval. This approval group is automatically assigned as the last Approver when these scenarios exist.

The **Termination Transaction Notification** group box gives you the ability to notify selected individuals (who are not listed as Approvers) when the final approval for the transaction has taken place.

19. If applicable, type the appropriate value in the **Seq#** field.

20. If applicable, type the Approver’s eight-digit **EmplID** number or select a value from the **Lookup** in the **EmplID** field.

21. If applicable, click **Insert** to add additional Approvers.
22. Type any applicable comments in the **Termination Workflow Comments** field.

**Note:**
- Appropriate comments are required for transactions. All comments are retained for reference.
- If terminating a UYR employee during an off period, comments are required.

23. Click **Save & Submit**.  
**Note:** This action assigns a Transaction ID, changes the Termination Transaction Status to Pending, and sends an e-mail to the first Approver.

OR

24. Click **Save as Draft**.  
**Note:** This action assigns Transaction ID and changes the Transaction Status to Draft.
Create Termination Transaction Page (cont.)

Note: If the Save & Submit button was clicked, the Termination Transaction Approvals group box displays.

Create Termination Transaction Page (cont.)

Note: If you are the Creator and an Approver of the termination workflow transaction, you can approve after clicking Save & Submit.